

SECTION C-5

SPECIFIC TASKS

5.0 PERFORMANCE WORK STATEMENT

Section Overview: The major functional requirements contained herein describe the supplies and services the Government will purchase and, thus, are the foundation of this solicitation. This section is organized as follows:

5.1 GRANTS MANAGEMENT

5.2 REVIEW

5.3 PROGRAM

The functional area approach used in this section, to express minimum performance requirements, represents currently projected products and services performed by a combination of government and contractor personnel. It is neither reflective nor indicative of any existing or required organizational arrangement. Minimum requirements are set forth in brief performance requirement statements, supplemented by corresponding standards of performance. Standards of performance are measures of quality and timeliness. Quality standards measure performance level. Acceptable Quality Level (AQL) is maximum acceptable deviation from standard, expressed in terms of a percentage of a lot. "Lot size" identifies units of output, i.e., the number of times a service is performed during a specified period of time. Max reflects the maximum amount of deviation, expressed in time, permitted to deviate from the standard. This is the "Not to exceed" value. The SP (Service Provider) shall measure its performance by means of a Quality Control Plan (QCP) designed to monitor minor standards necessary to maintain an acceptable level of performance. The Government will measure SP performance by means of a Quality Assurance Plan (QASP) focused on major standards the Government selects. Specification of an AQL does not allow the SP to knowingly provide defective service; instead, it is recognition of the fact that defective performance may sometimes occur unintentionally. As long as the percentage of defective performance does not exceed the specified AQL, the Government will not deduct for poor performance. However, the SP shall be required to re-perform or correct the defective service or product at no additional cost to the Government.

The very nature of extramural activities of the NIH involves daily interactions with a wide variety of individuals within and outside of the NIH. Therefore, SP staff may be required to interact on a daily basis with NIH staff within and outside of their assigned office, NIH contractors, staff in various DHHS offices, applicants, reviewers, staff in grantee institution business offices, scientists, patient advocates and members of the general public.

Although the SP shall be responsible for overall allocation and supervision of SP staff, details of day to day assignments of SP staff shall be provided by the NIH grants management, review, and program staff supported.

5.1 GRANTS MANAGEMENT

GENERAL INFORMATION

Grants Management support staff work independently within IC, NIH and DHHS policies and procedure guidelines and within the time frames and deadlines set by each Grants Management office and by the NIH (see TE-3 and 4). A representation of workload variation is shown in TE-5. Support staff is expected to resolve routine problems and bring unusual situations to the attention of the Grants Management Specialist/Officer or other staff for resolution. Support staff are expected to have mechanisms in place to track the status of work.

The service provider shall provide Grants Management Support services that will be accomplished through the following activities:

- Administrative Support
- Logistical Support
- File Management
- IMPAC II and other Data Management

5.1.1 REQUIREMENTS

5.1.1.1 ADMINISTRATIVE SUPPORT The SP shall:

- Type correspondence, forms, reports, spreadsheets and presentations
- Make requests for missing or late material
- Duplicate and collate grant documents
- Sort, distribute incoming mail; send outgoing mail
- Send non-electronic Notice of Grant award letters to grantees
- Answer, transfer telephone calls; receive visitors
- Respond to inquiries and provide information/material
- Order supplies; arrange for repair of shared equipment
- Process research training grant forms

5.1.1.1.0 CONDITIONS OF PERFORMANCE

Correspondence includes letters, emails and memos generated from scratch or templates, and are created and edited in Word or WordPerfect. Technical information can be prepared as spreadsheets created in Excel or MS Access or presentations created in PowerPoint. Documents are edited for compliance with required format and to ensure that grammar, spelling, punctuation and usage are correct. Support staff may need to put documents drafted by other Grants Management staff into final format with appropriate letterhead, and envelopes.

Documents are reviewed for completeness and missing, late or additional information must be obtained to ensure compliance with Federal grant regulations and policies. Information needed may include closeout documents, research training grant documents, missing applications or application pages, or Just In Time responses. Some information may be found in existing databases (e.g. Summary Statements). Requests for other information that is needed from applicants and grantees and other NIH staff may be made by phone, email, fax or letter. Follow-up with grantees is required on an as needed basis.

Document copies may be made utilizing centralized copy services or stand alone machines depending on the size of the job. Documents that typically need to be photocopied and collated include applications, documents for distribution to staff, FOIA information, informational packets for applicants and grantees, and non-electronic Notice of Grant award letters.

Mail may arrive by USPS from the NIH central mailroom, by courier, or fax. It may be necessary to identify the staff member for whom mail is intended using application number or other information, rather than name. Outgoing mail is sent via courier, USPS, internal NIH delivery, or hand-carried. Special procedures need to be followed for sending mail and packages to international destinations.

Incoming mail includes correspondence, applications, and progress reports sent directly from applicants and grantees; competing applications forwarded from the Center for Scientific Review; NIH newsletters and fliers. Outgoing mail may include correspondence or information/material being sent to applicants or grantees.

Once awards are processed, most Notice of Grant award letters are automatically sent by IMPAC II via email to grantees registered to receive electronic award notices. Non-electronic Notice of Grant award letters are sent by support staff via fax or USPS.

Support staff receive visitors and telephone calls, and provide requested information or refer them to appropriate staff members based on knowledge of the office activities and agency policies. Telephone calls must be answered in an understandable fashion, even to callers whose command of English may be limited. Voice mail messages must be retrieved and responded to or forwarded as appropriate. Interactions may be with scientists; institutional officials; government officials at various levels, such as members of Congress or their staff members; and members of the general public. In accord with IC guidelines, basic administrative questions may be answered directly. (Examples are inquiries about the status of an application or whether an award letter has been issued.) Other queries should be directed to

the Grants Management Specialist/Officer.

Responding to requests from customers (applicants and grantees, general public, NIH staff, other IC staff) involves answering basic administrative questions. Information/material to assist in resolving application and/or grant-related issues may be provided to customers via form letters, emails, faxes and telephone calls. Some research may be necessary to locate or compile response material. Support staff may serve as an office/branch/division representative for selected trans-NIH groups to offer input or feedback on policy, procedure or software development.

Office supplies are maintained and requests coordinated for needed materials for Grants Management staff. Requisitions are submitted in accord with NIH procedures and use appropriate NIH databases (TE-6). Arranging for repair of shared equipment, such as fax machines and photocopiers, involves monitoring equipment status, resolving minor problems, and requesting repairs through appropriate channels.

Ruth L. Kirschstein National Research Service Award (NRSA) institutional training grant forms (Statement of Appointment Form PHS 2271, Termination Notice PHS 416-7, Payback Agreement PHS 6031, and Annual Payback Activities Certification PHS 6031-1) are received and processed. A Statement of Appointment Form for each pre-doctoral and postdoctoral trainee is required annually; a Termination Notice is required upon completion of each pre-doctoral and postdoctoral trainee's appointment; a Payback Agreement form is submitted with the initial Statement of Appointment Form for each postdoctoral trainee; an Annual Payback Activities Certification is required for each postdoctoral trainee who may incur a payback obligation.

In accord with NIH policies and procedures, including the NRSA guidelines in the NIH Policy Statement, forms are reviewed for accuracy and completeness. Trainee eligibility and compliance with NRSA limitations are verified. Forms are processed and data is captured for trainee appointments and terminations in appropriate NIH databases (TE-6). Ongoing reviews of trainee appointment and termination records are conducted to assure records are consistent and up to date in both the official file and databases. Follow-up with grantees is required on an as needed basis; for example, to request error corrections, or when current appointments expire. Reports on trainee status are provided to the assigned Grants Management Specialist.

Ruth L. Kirschstein National Research Service Award (NRSA) individual fellowship grant forms (Individual Fellowship Activation Notice PHS 416-5, Termination Notice PHS 416-7, Payback Agreement PHS 6031 and Annual Payback Activities Certification PHS 6031-1) are received and processed. An Activation Notice is required for each pre-doctoral and postdoctoral fellow. A Termination Notice is required upon completion of each pre-doctoral and postdoctoral fellow's appointment; a Payback Agreement form is submitted with the Activation Notice for each postdoctoral fellow; an Annual Payback Activities Certification is required for each postdoctoral fellow who may incur a payback obligation.

In accord with NIH policies and procedures, including the NRSA guidelines in the NIH Policy Statement, forms are reviewed for accuracy and completeness. Fellow eligibility and compliance with NRSA limitations are verified. Forms are processed and data is captured for fellowship activations and terminations in appropriate NIH databases. A periodic review for status of fellowships pending activation and termination is conducted. Follow-up with grantees is required on an as needed basis; for example to secure missing materials.

The process of reconciling payback information may be performed at the IC, or the trainee documentation and fellowship files are forwarded to the NIH centralized Payback Service Center.

5.1.1.2 LOGISTICAL SUPPORT The SP shall:

- Process travel documents for staff
- Process staff training requests
- Arrange and schedule meetings

5.1.1.2.0 CONDITIONS OF PERFORMANCE

Arranging staff travel (local, domestic or foreign) requires entries into the appropriate NIH database (TE-6), interaction with the NIH-designated travel service provider, preparation of necessary documents (for example, travel orders and reimbursement vouchers), and obtaining required approvals. In rare instances, arrangements for foreign travel may be necessary which require additional coordination with Fogarty International Center to obtain necessary country clearances, visas, official Government passports and to secure Department clearances.

Arranging for staff training requires entries in the appropriate NIH database (NIHITS), preparation of necessary documents, obtaining necessary approvals, and making revisions and corrections as needed.

Arranging and scheduling meetings (office, teleconference) requires contacting participants and identifying available times, locations and/or equipment. It may be necessary for support staff to assist in the planning of agendas; maintain appropriate meeting records; take notes during meetings; collect relevant materials at the end of meetings; and produce minutes and/or reports.

5.1.1.3 OFFICIAL GRANT FILE MANAGEMENT The SP shall:

- Create official grant files (hard copy, electronic, or both)
- File documents
- Pull official files and distribute to staff
- Close out official grant files
- Dispose documents

5.1.1.3.0 CONDITIONS OF PERFORMANCE

Official files for grant-related documents are created, maintained and disposed in accord with Federal records management policy (36 CFR 1228 Disposition of Federal Records).

Files are shelved in the file room in a systematic fashion, and a tracking system is maintained to monitor location of files. An annual inventory of files is conducted.

Official grant file folders (hard copy, electronic or both) are created as needed; for example, for new competing applications, subsequent sections (e.g. for competing continuations), or to replace worn folders. Files are labeled for tracking and identification purposes. Labels may also include IC specific identifiers (for example, bar codes). Types of applications may be distinguished by different file folders; for example, manila folders are used for new pending competing applications which are then converted to permanent folders when applications are funded. It is anticipated that as part of the eRA efforts (see SECTION C-1, Emerging Requirements), a greater number of files will be created as or converted to electronic format through scanning.

All ICs receive an original and copies of each competing application. The original is filed in the official grant file. Copies are distributed to the appropriate IC staff and/or stored until after Council review.

Throughout the life of the grant project, a variety of additional forms and documents have to be filed (hard copy, electronic or both) as official grant documentation. This includes applications for continued funding, supplemental requests, Summary Statements, grant review documentation, award letters, correspondence, Financial Status Reports and appendix material. Contents of files are organized in accord with IC guidelines. Additional filing may include updates to other records, and institutional files in accord with NIH guidelines (NIH Manual Chapter 5808 "Establishment and Documentation of Files and Other Records, Including Monitoring Actions, for NIH Grant Programs").

The grantee is responsible for sending a non-competing progress report to the awarding IC (hard copy or electronic). The original is filed in the official grant file. A copy is distributed to the assigned Program Official. The official grant file is pulled, logged out and distributed to the appropriate Grants Management Specialist for award processing.

When additional grant-specific information is received or other need arises, the official file is pulled, logged out and distributed to the appropriate IC staff.

When the Notice of Grant Award has been issued or the need for the file has been satisfied, the file is logged in and re-shelved to storage (file room).

As required in the NIH Grants Policy Statement (Administrative Requirements – Closeout), closeout documents (a Final Invention Statement HHS Form 568, Final Progress Report and Final Financial Status Report SF-269 or 269A) must be submitted by grantees within 90 days after the final project period end date. Documents are reviewed for completeness, and additional follow-up may be required to obtain missing, late or additional information as necessary. As required, documents are forwarded to appropriate NIH staff for review, processing or approval.

Files and documentation (including SF-135, "Records Transmittal and Receipt") are prepared for transfer to the appropriate records storage facility in accord with NIH Manual Chapter 1742 ("Transfer, Withdrawal and Destruction of Records at the Washington National Records Center"). Files are boxed for transfer, and a listing of all IC records sent and stored at the records storage facility is maintained. Prior to transfer, it may be necessary to move boxes that weigh up to 40 lbs.

When necessary, previously archived records are retrieved from the appropriate records storage facility using OF 11, "Reference Request Form."

Confidential documents, such as unneeded applications and Summary Statements, are disposed consistent with established standards of DHHS and NIH. Disposal methods include recycling and shredding.

Unfunded applications are held one year, and then transferred to the appropriate records storage facility; closed grants are held one year, and then transferred to the appropriate records storage facility.

5.1.1.4 IMPAC II AND OTHER DATA MANAGEMENT The SP shall:

- Process actions in databases (TE-6)
- Query databases, extract material or data, run reports

5.1.1.4.0 CONDITIONS OF PERFORMANCE

Data is entered into IMPAC II or other databases to process a variety of actions; for example: automatic no-cost extensions; fellowship activations and terminations; trainee appointments and terminations; login of non-competing progress report receipt dates; application reinstatements or withdrawals; additions or deletions of IC secondary assignments; grant closeout; requests for Entity Identification Numbers; supply orders; staff travel and training requests; updates or changes to codes (application status, animal, human subject, minority/gender/children tracking); and other data elements (e.g. PI degree, addresses, telephone numbers). Occasionally, updates to IC informational sites may also be necessary.

Several layers of IMPAC II screens may need to be accessed to reach the appropriate screen where data must be entered, deleted, updated or changed. Additionally, for some processes that require some length of time to complete, one or more intermediate entries may be necessary before an action is finalized.

Reports are run from databases (TE-6) to track Grants Management Specialist assignments, application receipt and closeout workload, and for special projects as required. Examples of IMPAC II reports are included in TE-11.

Databases are queried to respond to inquiries, verify release of awards, and retrieve Summary Statements, Financial Status Reports and Notice of Grant award letters.

A grant file database (hard copy or electronic) is maintained to track status of files (open, closed, withdrawn, dual) and movement of files amongst IC staff.

5.1.2 STANDARDS OF PERFORMANCE**5.1.2.1 QUALITY AND TIMELINESS**

RFP No.	SP Activity	Quality Standard	AQL	Lot	Timeliness Standard	AQL	Max
5.1.1.1	Administrative Support						
5.1.1.1.1	Type correspondence, forms, reports, spreadsheets and presentations	Correspondence, forms, reports, spreadsheets and presentations are free of error	2%	1% of documents prepared per year	Within 2 WD of assignment	5%	Within 4 WD of assignment
		Correspondence, forms, reports, spreadsheets and presentations are free of error	2%	1% of documents prepared per year	Urgent items (5% of quantity) within 4 hours of assignment	5%	Urgent items (5% of quantity) within 1 WD of assignment
5.1.1.1.2	Make requests for missing or late material	Missing/late material is requested, tracked and obtained	5%	2% of missing/late material per year	Requested within 10 WD after submission deadline for applications or forms	5%	Requested within 15 WD after submission deadline for applications or forms
5.1.1.1.3	Duplicate, collate grant documents *	Copies are legible, faithfully reproduce the original, and are assembled correctly	2%	# of documents per week	Within 1 WD of request	5%	Within 2 WD of request
		Copies are legible and are assembled correctly	2%	# of documents per week	Urgent assignments (5% of quantity) within 30 minutes of request	5%	Urgent assignments within 1 hour of request
5.1.1.1.4	Sort, distribute incoming mail; send outgoing mail	Mail is sorted accurately and distributed to the correct destination	5%	# of pieces of mail per day	Within 1 WD of receipt	5%	Within 3 WD of request
		Outgoing mail is sent accurately	0.5%				
5.1.1.1.5	Send non-electronic Notice of Grant award letters	Non-electronic award letters are mailed or faxed accurately	0.5%	10% of non-electronic awards per year	Within 1 WD of award issue date	1%	Within 2 WD of award issue date
5.1.1.1.6	Answer, transfer telephone calls	Phone calls are answered courteously Correct information is given or call is accurately routed	2%	1% of calls per year	Calls answered by third ring; caller's needs addressed immediately	10%	Calls answered by fourth ring; caller's needs addressed within 1 WD

5.1.1.1.7	Respond to inquiries and provide information/material	Responses to inquiries are courteous and information/material is accurate	2%	1% of inquiries per year	Respond within 1 WD	5%	Respond within 2 WD
		Responses to inquiries are courteous and information/material is accurate	2%	1% of inquiries per year	Urgent requests (5% of quantity) are responded to within 1 hour	5%	Urgent requests (5% of quantity) are responded to within 4 hours
5.1.1.1.8	Order supplies, arrange for shared equipment repairs	Order and maintain supplies appropriately	5%	# of orders per month	Within 5 WD	5%	Within 10 WD
		Need for equipment repairs identified and request submitted to proper office	2%	2% of requests per year	Within 1 WD of request	5%	Within 2 WD of request
		Need for equipment repairs identified and request submitted to proper office	2%	2% of repairs needed per year	Urgent requests made within 30 minutes of need identified	5%	Urgent requests (1%) made within 1 hour of need identified
5.1.1.1.9	Process research training grant forms	Forms are thoroughly reviewed and errors are resolved	5%	5% of documents processed per year	Review and request error corrections within 10 WD of initial receipt of form	10%	Review and request error corrections within 20 WD of initial receipt of form
		Completed and/or corrected forms are processed accurately and completely in NIH databases	5%	5% of documents processed per year	Process completed and/or corrected form within 30 WD of initial receipt of form	10%	Process completed and/or corrected form within 45 WD of initial receipt of form
5.1.1.2	Logistical Support						
5.1.1.2.1	Process travel documents for staff	Arrangements for travel are accurate and complete	5%	# of travel orders per quarter; # of travel vouchers per quarter	Initiated within 5 WD of request	5%	Travel orders completed NLT 1 WD before onset of travel; travel vouchers completed within 5 WD of travelers' return
		Arrangements for travel are accurate and complete	5%	# of travel orders per quarter; # of travel vouchers per quarter	Urgent arrangements (1% of quantity) Initiated within 1 hour of request	5%	Travel orders completed NLT 1 WD before onset of travel; travel vouchers completed within 5 WD of travelers' return

5.1.1.2.2	Process staff training requests	Arrangements for training are accurate and complete	1%	# of training requests per quarter	Initiated within 5 WD of request	5%	Completed NLT 1 WD before registration deadline
		Arrangements for training are accurate and complete	1%	# of training requests per quarter	Urgent arrangements (1% of quantity) Initiated within 1 hour of request	5%	Completed NLT 1 WD before event
5.1.1.2.3	Arrange and schedule meetings	Meeting scheduled on specific day or earliest date attendees and locations are available	5%	# of meetings arranged per quarter	Scheduling completed within 3 WD of request and arrangements completed by COB the WD prior to meeting	5%	Scheduling completed within 5 WD of request and arrangements completed prior to meeting
5.1.1.3	Official Grant File Management						
5.1.1.3.1	Create official grant files (hard copy, electronic or both)	Paper and electronic files are labeled accurately	5%	1% of files created per year	Within 5 WD of receipt	5%	Within 10 WD of receipt
5.1.1.3.2	File documents (hard copy, electronic or both) *	Documents are filed correctly	3%	0.5% of documents per year	Within 2 WD of receipt	5%	Within 5 WD of receipt
5.1.1.3.3	Pull official files and distribute to staff	Files are pulled accurately; distribution is accurate	5%	1% of files pulled per year	Within 2 WD of receipt incoming material or request	3%	Within 4 WD of receipt incoming material or request
		Files are pulled accurately; distribution is accurate	5%	1% of files pulled per year	For urgent needs (10% of quantity), within 30 minutes of request	3%	For urgent needs, within 1 hour of request
5.1.1.3.4	Close out official grant files	Closeout documents are received and are complete; files are prepared and forwarded to appropriate records storage facility accurately	2%	500 terminated/terminating grants per year; 1000 files being transferred to records storage facility per year	Documents received within 120 calendar days of grant termination date; closed grant files are transferred 12 months after termination date	15%	Documents received within 240 calendar days of termination date; closed grant files are transferred 18 months after termination date
5.1.1.3.5	Dispose documents *	Unneeded or confidential documents are destroyed appropriately	5%	1% of documents destroyed per year	Within 5 WD after authorization.	5%	Within 15 WD of authorization

5.1.1.4	IMPAC II and other Data Management						
5.1.1.4.1	Process actions in databases **	Data entered is accurate and complete	0.5%	1% of actions per year	Within 5 WD of receipt of information	5%	Within 10 WD of receipt of information
5.1.1.4.2	Query databases **, extract material or data, run reports	Material or report is accurate and complete	5%	0.5% of queries requested per week	Within 3 WD of need or target date as relevant	5%	Within 5 WD of need or target date as relevant

* Documents, not including applications, can range from 1-25 pages. On average, applications may range from 60-500 pages.

** Processing an action or querying databases may require accessing several screens and making data entries in multiple fields to properly execute the update or change.

5.1.2.2 QUANTITY

Activity No.	Requirements/Tasks	Workload Indicator	Base Year	1st Year	2nd Year	3rd Year	4th Year
5.1.1.1	Administrative Support						
5.1.1.1.1	Type correspondence, forms, reports, spreadsheets and presentations	documents	229,000	241,000	253,000	265,000	279,000
5.1.1.1.2	Make requests for missing or late material	missing/late material	184,000	193,000	203,000	213,000	224,000
5.1.1.1.3	Duplicate, collate grant documents *	documents	319,000	335,000	351,000	369,000	387,000
5.1.1.1.4	Sort, distribute mail; send outgoing mail	pieces of mail	514,000	541,000	570,000	600,000	631,000
5.1.1.1.5	Send non-electronic Notice of Grant award letters	non-electronic awards	9,900	10,500	11,100	11,800	12,500
5.1.1.1.6	Answer, transfer telephone calls	telephone calls	221,000	232,000	243,000	255,000	268,000
5.1.1.1.7	Respond to inquiries and provide information/material	inquiries	22,000	23,000	24,000	26,000	27,000
5.1.1.1.8	Order supplies; arrange for shared equipment repairs	orders	1,200	1,200	1,200	1,200	1,200
		repairs	500	500	500	500	500
5.1.1.1.9	Process research training grant forms	forms	24,200	24,700	25,200	25,700	26,200
5.1.1.2	Logistical Support						
5.1.1.2.1	Process travel documents for staff	trips	810	810	810	810	810
5.1.1.2.2	Process staff training requests	classes or courses	700	700	700	700	700
5.1.1.2.3	Arrange and schedule meetings	meetings	775	775	775	775	775
5.1.1.3	Official Grant File Management						
5.1.1.3.1	Create official grant files (hard copy, electronic or both)	files	73,000	78,000	82,000	88,000	93,000
5.1.1.3.2	File documents (hard copy, electronic or both) *	documents	280,000	298,000	316,000	336,000	357,000
5.1.1.3.3	Pull files and distribute to staff	files	58,000	61,000	65,000	69,000	74,000
5.1.1.3.4	Close out official grant files	files closed out	16,000	17,000	18,000	19,000	20,000
		files archived	31,000	33,000	35,000	37,000	39,000
5.1.1.3.5	Dispose unneeded or confidential documents *	documents	93,000	99,000	105,000	112,000	118,000

5.1.1.4	IMPAC II and other Data Management						
5.1.1.4.1	Process actions in databases **	actions	191,000	202,000	214,000	227,000	241,000
5.1.1.4.2	Query databases **, extract material or data, run reports	queries	592,000	622,000	653,000	685,000	719,000

* Documents, not including applications, can range from 1-25 pages. On average, applications may range from 60-500 pages.

** Processing an action or querying databases may require accessing several screens and making data entries in multiple fields to properly execute the update or change.

5.2 REVIEW SUPPORT

GENERAL INFORMATION

Review support staff work independently within IC, NIH and DHHS policies and procedure guidelines and within the time frames and deadlines set for each meeting by the SRA, the IC and the NIH. The support staff work on non-scientific, clerical, logistic and data management aspects of each review meeting while the SRA concurrently works on the scientific and policy aspects of the review meeting. Support staff are expected to resolve routine problems and bring unusual situations to the attention of the SRA or other staff for resolution. Support staff are expected to have mechanisms in place to track the status of work throughout the review process. Throughout SECTION 5.2, the term “reviewer” refers to members of review meetings, including mail reviewers/outside opinions. The term “participant” refers to attendees of both review and non-review meetings. See TE-7 for variations in IC review activities.

The service provider shall provide Review Support through the following activities:

- Administrative Support
- IMPAC II and other Data Management
- Meeting Logistics
- IC Internal Receipt and Referral
- Processing of Assigned Applications and Proposals
- Document Processing and Preparation

5.2.1 REQUIREMENTS

5.2.1.1 ADMINISTRATIVE SUPPORT The SP shall:

- Provide telephone coverage
- Duplicate, collate and scan documents
- Create and maintain general office files
- Sort and distribute incoming mail; send or deliver outgoing mail
- Correspond by email
- Fax
- Prepare registration for training and meeting attendance
- Arrange for travel of staff and Federal reviewers, process travel vouchers
- Arrange and schedule staff and internal meetings
- Maintain and order supplies
- Arrange for equipment repairs

5.2.1.1.0 CONDITIONS OF PERFORMANCE

Phone calls must be answered in an understandable fashion, even to callers whose command of English may be limited. In accordance with IC guidelines, basic administrative and nonscientific questions may be answered directly. Other queries should be directed to the SRA, or other NIH staff or offices. Some calls may require researching application or review meeting information.

Document copies may be made utilizing centralized copy services or stand alone machines, depending on the size of the job. These copies are not the duplicates of applications ordered by the CSR Division of Receipt and Referral or the copies of applications for reviewers made by NHLBI or NIEHS.

Files may be in hard copy, electronic or both. Typical files kept are NIH and IC specific policies and procedures, forms and templates, files for each chartered review committee, CVs of reviewers, general information about hotels and conference facilities, workload information, travel files, and historical office information.

Mail may arrive electronically, by USPS from the NIH central mailroom, or by local courier or overnight express mail services. It may be necessary to identify the staff member mail is intended for by using application number or other information, in addition to name. Outgoing mail is sent via local courier, USPS, overnight express mail services, internal NIH delivery, or hand carried.

Special procedures need to be followed for sending mail and packages to international destinations.

Correspondence by email includes composing, reading and answering emails to or from NIH staff, applicants, reviewers, hotels, travel agencies, and national scientific societies. This may also include creating and maintaining email distribution lists.

Support for training registration includes entering staff information into the NIHITS system. Support for SRA meeting registration may include contacting national or international scientific societies.

Travel for Federal staff, including reviewers who are Federal employees, includes contacting the traveler and the designated travel service provider, making hotel, car rental and transportation reservations as needed for each trip, entering information into the NIH NBRSS travel manager system and processing government travel orders and vouchers through appropriate channels and approving officials. Foreign travel for staff and reviewers requires coordination with the Fogarty International Center to obtain necessary country clearances and visas and securing of Departmental clearances. Foreign travel for staff also requires preparation and processing of paperwork for official government passport. Travel paid for by a non-governmental source requires additional clearances. Travel orders and reimbursement requests must be tracked and problems corrected.

Staff and internal meetings can be face to face meetings or via teleconference call. Scheduling these meetings requires contacting participants and identifying available times, locations and arranging for needed equipment.

Maintaining office supplies and coordinating requests for needed materials for office staff includes maintaining an inventory of frequently used supplies and submitting requisitions in accordance with NIH procedures and using appropriate NIH databases.

Arranging for equipment repairs involves monitoring equipment status and requesting repairs through appropriate channels.

5.2.1.2 IMPAC II AND OTHER DATA MANAGEMENT The SP shall provide data entry, data verification, and data extraction services including:

- Enter meeting data
- Enter roster data
- Enter application meeting assignments, reviewer assignments and conflicts, and update as necessary
- Create and enter subproject records
- Enter scores, special codes and release meeting
- Verify and reconcile original applicant information with IMPAC II information and correct if needed
- Print IMPAC II reports, retrieve previous summary statements and other IMPAC II data
- Order or create CDs for review meetings
- Set up and monitor electronic/internet assisted review

5.2.1.2.0 CONDITIONS OF PERFORMANCE

Entering meeting and roster data includes creating and editing each meeting in the IMPAC II system, entering all required meeting information, and entering and proofreading all required participant and Federal staff information for the meeting participant roster. This may require contacting participants to verify or obtain data or missing information. Data for the meeting agenda must also be entered, and for FACA meetings, the Federal Register Notice must be prepared for release by the Committee Management Office.

During FY 2002, there were a total of more than 3000 review meetings for competing applications and proposals, involving roughly 40,000 reviewers. Review meetings are typically face to face meetings of the reviewers in hotel conference rooms in the Washington, DC metropolitan area, but they may also be held in other locations or in other cities. Review formats also include site visits to

applicant institutions, reverse site visits/applicant interviews, teleconferences, videoconferences, and mail ballots. Many IC review meetings are preceded by one or more orientation and/or triage teleconferences involving some or all of the reviewers. Approximately 10% of review meetings are preceded by a non-FACA workgroup review panel meeting for one or more of the applications or proposals to be reviewed in the FACA meeting. All review meetings under the FACA require the Federal Register Notice to be released 30 days before the meeting. The NIH held 2676 review meetings under FACA in FY 2002. TE-5 shows the number of competing applications and proposals received and review meetings held per month during fiscal year 2002.

The number of reviewers per review meeting may range from 3 to more than 50. Information about each reviewer must be entered into IMPAC II to create the review meeting participant roster. Each meeting requires creation and editing of at least 3 types of participant rosters. The rosters may be distributed to reviewers, various NIH staff and offices, and to applicants depending on the type of review.

Each application review meeting includes from 1 to more than 100 applications of one or more grant mechanisms. Each application may have one or many subcomponents. Support staff enter application meeting assignments as directed by the professional staff. Entering application meeting assignments may include verifying assignment and application information with the SRA or other NIH staff prior to using the IMPAC II Peer Review Module. Other work in IMPAC II for each grant review meeting includes entering review order, checking and correcting application specific information, such as face page information and budget and the grant images, and creating subcomponent records and entering subcomponent information.

Although R&D contract proposals (except for the NIH Loan Repayment proposals) are not logged into the IMPAC II system, review meeting data and participant roster information for reviews of R&D contract proposals must be entered into the IMPAC II system.

Applications and proposals and their subcomponents typically have 2-3 assigned reviewers each, with a range of 2 to up to 20 or more assigned reviewers altogether, depending on complexity. Each reviewer typically has 6 to 10 review assignments per review meeting, but the number of assignments per reviewer may range from 1 to 15 or more. Reviewer assignments and conflicts for grant applications are typically entered into IMPAC II or prepared in a word processing or spreadsheet application program as directed. Reviewer assignments and conflicts, if any, for R&D contract proposals are done in a word processing or spreadsheet program, since contract proposals are not logged into IMPAC II.

All reviewers at a review meeting, except those in conflict with an application or proposal, score each application or proposal. Scores for grant applications must be entered into the IMPAC II system; scores may also need to be entered or calculated for subcomponents of multi-component applications. Application scores may be entered into IMPAC II manually or from scanned score sheets, depending on the size of the review meeting. The proper percentile base must be selected. Application scores shall be released within 3 business days following the end of the review meeting, unless instructed otherwise by the SRA. Codes for human subject protection, inclusion, animal welfare, and clinical trials and all other applicable special codes shall be entered and the meeting shall be released within 5 business days after the conclusion of the review. Score and code release may not occur without SRA approval.

Support staff must be able to print out and use all IMPAC II reports related to review activities, and provide IMPAC II reports to the SRA as needed. See SECTION C-6 and TE-11 for examples of IMPAC II reports related to review activities.

Data retrieved from IMPAC II modules may also be downloaded into Excel for further manipulation or printing. Data may also be retrieved from IC specific databases (see examples in TE-6) or publicly accessible databases such as CRISP or Medline.

CDs with PDF files of grant applications, review instructions, review policies, previous summary statements, and special announcements are ordered from IMPAC II or prepared manually using special workstations as directed. CDs received should be checked for accuracy, quality and completeness and problems followed up for correction. SP shall be able to answer routine

questions from reviewers about the contents and use of the CDs.

Setting up electronic/internet assisted review involves using appropriate IMPAC II functions. The SP should also be able to assist reviewers with routine questions about logging into the internet assisted review website, the NIH eRA Commons, and posting and revising their critiques and preliminary scores. Monitoring electronic/internet assisted review involves logging in to the secure website several times to track submission of reviewers' critiques and printing out reports.

Support staff participate in eRA task force activities and beta-test phases of NIH-wide and IC-specific software application development. They also participate on committees, working groups, user groups, and pilot projects in order to aid and improve business practice or peer review procedures.

5.2.1.3 MEETING LOGISTICS The SP shall:

- Mail material to participants
- Set up meeting room and assist at meeting
- Make hotel, conference room, and teleconference arrangements
- Arrange for document disposal or disposition

5.2.1.3.0 CONDITIONS OF PERFORMANCE

Mail out of materials to participants typically occurs 4 to 6 weeks prior to the meeting. Mail out includes creation of unique packages for each participant as required by each participant's specific review or meeting assignments. Each participant's package may include one or more applications, CDs, appendix materials, the master and personalized assignment list, cover letter, instructions for electronic review, travel and hotel information, conflict of interest and confidentiality information and signature forms, travel reimbursement information, review criteria, Request for Applications, Program Announcements, or Requests for Proposals, as applicable, and any late arriving application materials. At the time of the mail out, the meeting roster or participant list needs to be transmitted to both the travel agency and the hotel. Support staff need to be able to lift 40 pound boxes. Approximately 80% of all meetings have additional mail outs of late arriving materials and revised participant assignments. Mail out to the participants may also include transmittal of information by fax, fax modem, email or other electronic means. It is necessary to track receipt of materials by participants and follow up to correct problems.

Mailings to participants are typically via express mail, requiring familiarity with express mail regulations, policies and procedures, and preparation of special express mail labels. Mailings may also require tracking of package delivery via internet web sites for the express mail services and follow up to correct non-receipt problems.

Meetings may begin prior to or extend beyond normal working hours. The meeting room needs to be set up prior to arrival of the participants. Set up and assisting at meetings includes collecting supplies and additional application and instruction materials and arranging to have them transported to the meeting location, setting out materials for participants and observers in the meeting room, working with hotel staff to correct problems that arise during the meeting, making working lunch or dinner arrangements, controlling access to the meeting room, protecting the confidentiality of the meeting and application materials, setting up, taking down and securing government equipment used in the meeting, working with hotel provided audio-visual contractors, arranging for special accommodations for disabled participants, tracking the attendance of reviewers on each meeting day, ensuring that participants in conflict leave the room and return again at appropriate times, assisting with teleconferences and teleconference equipment and videoconferences during the meeting, and properly disposing of meeting materials at the end of the meeting. Meeting folders and name tents are also made and set out for the participants, the Chairperson, the SRA, and authorized observers. Additional sets of applications for review meetings, the meeting agenda, seating chart and other information are also typically set out for authorized meeting observers. Support staff typically distribute various meeting related documents to participants and collect and track documents, CDs, diskettes and other information from the participants during the meeting. Support staff also provide assistance to participants who need to change travel or hotel arrangements during the meeting. It is necessary to track the status of

meeting arrangements and correct problems as they occur.

For reviews of R&D contract proposals, assistance at the review meeting may also include calculating weighted scores for each proposal.

Hotel, conference room, and teleconference arrangements include locating appropriate hotel and conference rooms for the meeting, arranging for meeting rooms and participant hotel sleeping rooms, and arranging for transportation of all necessary meeting materials to the meeting site. This may include on-site evaluation of local hotel facilities for suitability for specific meetings. For meetings outside of the Washington, DC metropolitan area, knowledge of Government per diem and M&IE rates is required, and preparation and routing of Actual Expense Authorizations may be needed. This may also include making arrangements for transportation of participants and the SRA from the hotel to the site visit location. Teleconference arrangements are made with the NIH teleconference contractor and include reserving the date and time, providing a roster with participant, staff and, in some cases, applicant names and phone numbers, and forwarding the teleconference bill to the appropriate office. Some orientation teleconferences will be tape-recorded and duplicate tapes will need to be ordered and sent to participants who could not participate in the teleconference. The status of hotel and teleconference arrangements and participant hotel confirmations are tracked and participants contacted with reminders as necessary.

Document disposal and disposition includes packing up all meeting materials and equipment at the conclusion of the meeting, arranging for transportation of documents and equipment back to the review office, and arranging for pick up and shredding of appropriate documents. Applications, proposals, and other review documents related to tobacco and smoking must be saved, labeled and forwarded to the appropriate IC office. For application review meetings, original correspondence, one copy of the appendix material and additional information for each application is sent to the IC main file room. Following R&D contract proposal review meetings, documents are forwarded to the contracting office. Documents required by the Committee Management Office, including meeting minutes and conflict of interest forms, are collected, duplicated, filed, and the originals delivered to the Committee Management Office. Support staff must ensure that no reviewer vote sheets are lost and that all reviewer vote sheets are accounted for from the conclusion of the review meeting until scores are verified and the SRA gives authorization for disposal. Upon conclusion of the review cycle, meeting, application, and daily office files related to that cycle are shredded unless otherwise directed. Document disposition also entails receiving expense vouchers from participants, checking them for completeness and forwarding them to the appropriate office.

5.2.1.4 IC INTERNAL RECEIPT AND REFERRAL The SP shall provide for IC internal receipt of applications:

- Receipt, routing and storage of original applications and duplicates forwarded from CSR or sent directly from applicants

5.2.1.4.0 CONDITIONS OF PERFORMANCE

For applications forwarded from the CSR Division of Receipt and Referral, this typically includes confirming IC assignment, logging of applications received from CSR into an IC database or spreadsheet, storage of duplicated copies, and routing of the original signed copy of each application to the IC grants management office. Receipt of applications directly from applicants involves opening of boxes and logging receipt of applications into an IC database or spreadsheet. This may also require rerouting of copies to CSR to ensure proper logging of applications in IMPAC II.

Referral support may involve data entry related to assigning applications to review meetings or to assignment of preliminary program class codes.

5.2.1.5 PROCESSING OF ASSIGNED APPLICATIONS AND PROPOSALS The SP shall process applications and proposals assigned for review and perform file maintenance including:

- Administrative review of applications
- Extraction of information from applications and proposals
- Checking quality and quantity of duplicated applications, and arranging for reduplication of applications with errors
- Creation and maintenance of meeting and application and proposal files

5.2.1.5.0 CONDITIONS OF PERFORMANCE

Administrative review of applications includes verification of the review assignment which may involve consulting with the SRA or senior review staff about which application(s) or types of applications are to be reviewed in a given review meeting. Correcting problems may involve preparing forms to change the application review assignment or entering assignment changes into the IMPAC II system at the direction of the SRA or other senior review or referral staff. When assignment changes are made, the application and associated materials are then delivered to the appropriate staff. Also included is checking each application for proper formatting, for completeness and correctness of human subjects and vertebrate animal information, and for completeness of budget information, notifying the SRA of deficiencies, and contacting applicants to obtain missing information or corrections if requested by the SRA. In addition, administrative review also includes reconciling information in IMPAC II with information in the submitted applications, keeping an inventory of all material submitted with each application, including the appendix material, and reconciling hard copies of applications with IMPAC II records, notifying the SRA of discrepancies and following up with various NIH offices to resolve discrepancies. This may also include locating and obtaining misplaced or misrouted application materials.

Extraction of information from applications and proposals involves creating documents, tables, or spreadsheets of all involved investigators and institutions, and finding the subcomponent titles, investigators, and budgets from multi-component applications and proposals.

Duplicates of applications are to be checked for copy quantity, quality and completeness, and errors corrected. Working copies and/or duplicates and appendices are shelved and labeled in a systematic way so that they can be retrieved by the SRA or other authorized staff in the absence of the support staff.

A meeting file includes all correspondence and other items related to the meeting, including hotel contracts, checklists for workflow tracking/task completion, Federal Express shipping logs, meeting roster, a master list of applications or proposals, and a list of all additional information received from applicants along with date received and date sent to reviewers. Application files include a copy of the application, all pertinent correspondence, and additional information received from applicants. Application and meeting files must be organized in a systematic way so that individual files may be retrieved by the SRA or other authorized NIH staff as needed in the absence of the support staff.

5.2.1.6 DOCUMENT PROCESSING AND PREPARATION The SP shall do document processing and preparation including:

- Creation of formatted, spell checked and proofread summary statement drafts containing application Description(s) and reviewer critiques and release of final summary statement
- Other typing, word processing and spreadsheets

5.2.1.6.0 CONDITIONS OF PERFORMANCE

Summary statement draft preparation includes using an appropriate template for the grant mechanism, (for sample format, see TE-8), inserting, proofing, and correcting, if directed by the SRA, scanned and character recognized Description sections provided by the applicant, inserting reviewers' critiques in appropriate places, and finalizing the format according to NIH and IC

guidelines. Multi-component applications have multiple Description sections that must be located in the application and inserted into the appropriate place in the summary statement. The term "single component" refers to one subcomponent in a multiple component application such as a program project or to one single component application such as an R01, R21, or R15. Summary statement drafts are typically generated in score order, but the SRA may indicate some other order for a given review.

For approximately 10% of application review meetings, a preliminary Draft Review Report in a format similar to a summary statement will need to be prepared using an appropriate template for the grant mechanism. The Draft Review Report will later be edited, reformatted, and finalized to become the summary statement.

For review meetings for R&D contract proposals, Technical Evaluation Reports/Minutes of the review meeting need to be prepared using an appropriate format.

Reviewers' critiques may be in hard copy with handwritten edits, various word processing programs and formats, PDF files, or other formats. Support staff must ensure that the latest versions of each reviewer's critiques are inserted into the Draft Review Report, summary statement or Technical Evaluation Report/Minutes, as applicable for the review; this may include entering handwritten edits into electronic versions of the critiques. Section headings and the order of sections in reviewer-written critiques are corrected as needed.

Support staff must provide properly formatted, spell checked, proofread draft summary statements, Draft Review Reports, or draft Technical Evaluation Reports/Minutes, as appropriate for the review, to the SRA at a sufficient daily rate so that the SRA can finalize the scientific content of the documents and so summary statements can be uploaded to IMPAC II by the deadline. The CSR deadlines for release of final summary statements are generally no later than 30 calendar days before council and the deadlines for IC reviews are typically no more than 30 business days from the end of the review meeting, but they may be a much shorter period of time. Support staff enter SRA edits to summary statement drafts, including handwritten revisions. Support staff shall ensure that each summary statement is in the proper format, shall upload the final summary statements to the IMPAC II database after SRA approval, and follow up to ensure that the summary statements have been uploaded correctly. Microsoft Word, Adobe Acrobat reader, the Peer Review Module in IMPAC II and secure internet websites are used to generate and release summary statements.

Other typing and word processing may include creating, editing or formatting of letters, memos, documents related to peer review of R&D contract proposals, preparation of forms related to nomination of new members for standing review committees, and charts, tables and reports about review meetings or review outcomes. Word processing may be in either Word or WordPerfect. Charts or presentations in PowerPoint may also be included. Spreadsheets with data related to staff, applicants, applications, review meetings, reviewers, review outcomes, or letters of intent may be prepared in Excel.

5.2.2 STANDARDS OF PERFORMANCE**5.2.2.1 QUALITY AND TIMELINESS**

RFP No.	SP Activity	Quality Standard	AQL	Lot	Timeliness Standard	AQL	Max
5.2.1.1	Administrative Support						
5.2.1.1.1	Provide telephone coverage	Response is courteous	0.1%	3,000 phone calls per year	Call answered by 3rd ring	10%	Call answered by 4th ring
		correct information is given and	1%				
		calls and messages are forwarded correctly	2%				
5.2.1.1.2	Duplicate, collate and scan documents	Documents are legible and faithfully reproduce the original	2%	# of documents duplicated and collated per day	Within 1 WD of request	5%	Within 2 WD of request
					For urgent documents (20% of quantity), within 1 hour of request	5%	For urgent documents, within 2 hours of request
5.2.1.1.3	Create and maintain general office files	Files are created and maintained accurately	3%	# of documents filed per month	Within 3 WD of distribution	5%	Within 1 week of distribution
5.2.1.1.4	Sort and distribute incoming mail; send or deliver outgoing mail	Incoming mail is distributed accurately	5%	3000 pieces of incoming mail per year	Within 1 WD of receipt	5%	Within 2 WD
					For urgent incoming mail (30% of quantity), within 1 hour of receipt	5%	Within 2 hours
		Outgoing mail is sent or delivered accurately	0.5%	3000 pieces of outgoing mail per year.	Within 1 WD	5%	Within 3 WD
					For urgent mail (10% of quantity), within 3 hours	5%	Within 4 hours
5.2.1.1.5	Correspond by email	Emails are accurate and composed in appropriate business language. Incoming emails are read and answered	2%	# of emails per day	Emails sent or read and answered within 4 hours	10%	Emails sent or read and answered within 1 WD
					For urgent emails (10% of quantity), sent or read and answered within 30 minutes	5%	For urgent emails, sent or read and answered within 1 hour

5.2.1.1.6	Fax	Documents are faxed to correct destination	2%	# of documents faxed per week	Within 1 WD of request	5%	Within 2 WD of request
					For urgent faxes, (10% of quantity) within 1 hour of request or by COB, whichever is sooner	5%	For urgent faxes, within 2 hours of request or by COB, whichever is sooner
5.2.1.1.7	Prepare registration for training and meeting attendance	Requests are prepared correctly and routed to correct office for approval	1%	# of actions per month	Processed by all applicable internal deadlines	5%	Completion NLT 1 WD before registration deadline
					For urgent requests (1% of quantity), initiated within 1 hour of request	5%	For urgent requests, completed NLT 1 WD before event
5.2.1.1.8	Arrange for travel of staff and Federal reviewers, process travel vouchers	Travel orders accurately reflect approved request, vouchers processed accurately and forwarded to correct office	5%	# of travel requests per month	Processed by all applicable deadlines	5%	NLT 1 WD prior to travel
					For urgent travel (5% of quantity), initiated within 1 hour of request	5%	For urgent travel, NLT 1 WD prior to travel
5.2.1.1.9	Arrange and schedule staff and internal meetings	Meeting scheduled at earliest time attendees and locations are available	5%	# of meetings per month	Scheduling completed within 3 WD of notification and arrangements complete by COB the WD prior to meeting	5%	Scheduling completed within 5 WD of notification and arrangements complete prior to meeting
					For urgent meetings (5% of quantity), scheduling completed within 2 hours of notification and arrangements complete by 2 hours prior to meeting	5%	For urgent meetings, scheduling completed within 4 hours of notification and arrangements complete by 1 hour prior to meeting
5.2.1.1.10	Maintain and order supplies	Supplies available when needed	5%	# of orders per week	Within 5 WD of request	5%	Within 10 WD of request
5.2.1.1.11	Arrange for equipment repairs	Need for repairs identified and request submitted to proper office	5%	# of requests per month	Within 1 WD of request	5%	Within 2 WD of request
					For urgent repairs (5% of quantity), within 30 minutes of request	5%	For urgent repairs, within 1 hour of request

5.2.1.2	IMPAC II and other Data Management						
5.2.1.2.1	Enter meeting data	Data entered are correct and complete	2%	# of meetings per month	Within 2 weeks of receiving data	20%	Within 3 weeks of receiving data but FRN must be released NLT 30 days before meeting
					For urgent review meetings (10% of quantity), within 4 hours of receiving data	20%	For urgent review meetings, within 1 WD of receiving data
5.2.1.2.2	Enter participant data into roster	Data entered are correct and complete	5%	# of entries per week	Within 2 WD of receiving data	20%	Within 1 week but NLT 2 WD before the mail out
					For urgent review meetings (10% of quantity), within 4 hours of receiving data	20%	For urgent review meetings, within 1 WD of receiving data
5.2.1.2.3	Enter application meeting assignments	Applications assigned to correct review meeting	0.5%	# of applications assigned per week	For CSR review, within 1 WD of notice of meeting assignment information. For IC review, within one week of application login to IMPAC II	5%	For CSR, within 2 WD of notice of assignment information. For IC review, within 2 weeks of application login to IMPAC II
					For urgent review meetings (10% of quantity), within 4 hours of receiving assignment information	5%	For urgent review meetings, within 1 WD of receiving assignment information
5.2.1.2.4	Enter reviewer assignments and conflicts	Assignments and conflicts are correct and complete	0.5%	# of assignments and conflicts entered per week	2 WD within receiving reviewer assignment and conflict information	5%	4 WD within receiving reviewer assignment and conflict information but NLT 1 WD prior to mail out date
					For urgent review meetings (10% of quantity), within 4 hours of receiving reviewer assignment and conflict information	5%	For urgent review meetings, within 1 WD of receiving reviewer assignment and conflict information

5.2.1.2.5	Create and enter subproject records	Subproject records are correct and complete	5%	# of subproject records created and entered per month	NLT 4 weeks prior to mail out	20%	NLT 3 weeks prior to mail out
					For urgent review meetings (10% of quantity), within 1 WD of receiving request	20%	For urgent review meetings, within 2 WD of receiving request
5.2.1.2.6	Input and release scores	Scores are correct and complete when released	0%	# of scores input per week	Scores entered and released within 2 WD of end of review meeting	20%	Scores entered and released NLT 3 WD after end of review meeting
					For urgent review meetings (10% of quantity), scores entered and released within 1 WD of end of review meeting	20%	For urgent review meetings, scores entered and released within 2 WD of end of review meeting
5.2.1.2.7	Input codes and release meeting	Codes provided by SRA are entered correctly and completely and meeting is released	0%	# of codes input per week	Codes entered and meeting released within 3 WD of end of review	20%	Codes entered and meeting released NLT 5 WD after end of review meeting
					For urgent review meetings (10% of quantity), codes entered and meeting released within 1 WD of end of review meeting	20%	For urgent review meetings, codes entered and meeting released within 2 WD of end of review meeting
5.2.1.2.8	Verify, reconcile, and correct if needed, original applicant information with IMPAC II information	Information in IMPAC II is correct and complete	0.5%	# of applications verified and reconciled per week	Information correct and complete NLT 1 WD prior to mail out	10%	Information correct and complete when the summary statement is released
5.2.1.2.9	Print IMPAC II reports, retrieve previous summary statements	Reports and previous summary statements are complete and correct	2%	# of reports and previous summary statements retrieved per month	Report or previous summary statement available NLT 3 WD prior to deadline	20%	Report or previous summary statement available on deadline
					For urgent review meetings (10% of quantity), report or previous summary statement available 1 WD prior to deadline	20%	Report or previous summary statement available on deadline

5.2.1.2.10	Order or create CDs for review meetings	CD contents are correct and complete, correct number ordered	2%	# of review meetings per month	CDs received and ready for use one WD before deadline	50%	CDs received and ready for use on deadline
5.2.1.3	Meeting Logistics						
5.2.1.3.1	Mail out to participants	Mail out packages are correct and complete	3%	# of packages sent to participants per week	Packages are sent by deadline	5%	Packages are sent 1 WD after deadline
5.2.1.3.2	Set up meeting room and assist at meeting	Meeting room set up correctly, attentive to needs of meeting	5%	# of meetings per week	Meeting room set up 1 hour before start of meeting	20%	Meeting room set up 30 minutes before start of meeting
5.2.1.3.3	Hotel, conference room, and teleconference arrangements	Arrangements accurately reflect request	5%	# of requests per month	Within 10 WD of receipt of request	20%	Within 20 WD of receipt of request but NLT 1 WD prior to mail out
					For urgent review meetings (10% of quantity), within 1 WD of receipt of request	20%	NLT 1 WD prior to mail out
5.2.1.3.4	Document disposal or disposition	All documents distributed or destroyed appropriately	2%	# of documents distributed or destroyed per week	Within 10 WD of authorization	20%	Within 20 WD of authorization
5.2.1.4	IC Internal Receipt and Referral						
5.2.1.4.1	Receipt, routing and storage of original applications and duplicates forwarded from CSR or sent directly from applicants	Receipt of application recorded and assignment checked. Application directed to correct destination	5%	# of applications received by IC per week	Within 5 WD of receipt of application	10%	Within 10 WD of receipt of application
5.2.1.5	Processing of assigned applications and proposals						
5.2.1.5.1	Administrative review of applications	Administrative review complete and accurate	5%	20% of the # of applications per week	Within 2 weeks of receipt of applications assigned to meeting	10%	Within 3 weeks of receipt of applications assigned to meeting
5.2.1.5.2	Extraction of information from applications and proposals	Information extracted is correct and complete	5%	20% of the # of applications per week	By target date	5%	NLT 3 days past target date

5.2.1.5.3	Checking quality and quantity of duplicated applications, and arranging for reduplication of applications with errors	Duplicates are readable, correct, and complete. Correct quantity is received	5%	300 representative sets of duplicate applications	Within 2 weeks of receipt of duplicates but NLT one week prior to mail out	10%	Within 3 weeks of receipt of duplicates but NLT one week prior to mail out
5.2.1.5.4	Creation and maintenance of meeting and application and proposal files	Meeting and application files are complete and accurate	5%	300 files	For creation, within 2 weeks of receiving application. For maintenance, within 2 WD of receipt of data or changes	20%	For creation, within 3 weeks of receiving application. For maintenance, within 3 WD of receipt of data or changes
5.2.1.6	Document Processing and Preparation						
5.2.1.6.1	Creation of formatted and spell checked summary statement drafts containing abstract and reviewer critiques and release of final summary statement	Correct and complete draft summary statements containing updated critiques are available for SRA.. Final summary statement released appropriately	Correct and complete critiques in summary statement, 1%. Final summary statement released appropriately, 0%.	500 summary statements	Draft summary statements for 12 single components generated per day Final summary released within 1 WD of receipt	10%	Draft summary statements for 10 single components generated per day Final summary released within 2 WD of receipt
5.2.1.6.2	Other typing, word processing and spreadsheets	Documents and spreadsheets are free of errors	2%	1% of documents and spreadsheets per year	Prepared by target date	10%	Prepared NLT 2 days later than target date

5.2.2.2 QUANTITY

Activity No.	Requirements/Tasks	Workload Indicator	Base Year	1st Year	2nd Year	3rd Year	4th Year
5.2.1.1	Administrative Support						
5.2.1.1.1	Provide telephone coverage	# of calls	370,000	410,000	450,000	490,000	540,000
5.2.1.1.2	Duplicate, collate and scan documents	# of pages	6,700,000	7,300,000	7,900,000	8,600,000	9,300,000
5.2.1.1.3	Create and maintain general office files	# of files	33,000	36,000	40,000	44,000	48,000
5.2.1.1.4	Sort and distribute incoming mail; send or deliver outgoing mail	# of pieces of mail	680,000	750,000	820,000	900,000	990,000
5.2.1.1.5	Correspond by email	# of emails	1,400,000	1,500,000	1,700,000	1,800,000	2,000,000
5.2.1.1.6	Fax	# of faxes	320,000	350,000	390,000	420,000	470,000
5.2.1.1.7	Prepare registration for training and meeting attendance	# of training & meeting requests	1,300	1,300	1,400	1,500	1,500
5.2.1.1.8	Arrange for travel of staff and Federal reviewers, process travel vouchers	# of trips	2,100	2,200	2,300	2,400	2,500
5.2.1.1.9	Arrange and schedule staff and internal meetings	# of staff meetings	2,700	2,800	3,000	3,100	3,300
5.2.1.1.10	Maintain and order supplies	# of supplies ordered	2,700	2,900	3,000	3,200	3,300
5.2.1.1.11	Arrange for equipment repairs	# of repairs	1,300	1,300	1,400	1,500	1,500
5.2.1.2	IMPAC II and other Data Management						
5.2.1.2.1	Enter meeting data	# of meetings	4,300	4,600	4,900	5,200	5,500
5.2.1.2.2	Enter participant data into roster	# of participants	57,000	60,000	64,000	68,000	72,000
5.2.1.2.3	Enter application meeting assignments	# of applications	71,000	75,000	80,000	85,000	90,000
5.2.1.2.4	Enter reviewer assignments and conflicts	# of assignments	300,000	320,000	340,000	370,000	390,000
5.2.1.2.5	Create and enter subproject records	# of subproject records	31,000	33,000	35,000	37,000	39,000
5.2.1.2.6	Input and release scores	# of scores input and released	930,000	990,000	1,100,000	1,120,000	1,190,000
5.2.1.2.7	Input codes and release meeting	# of codes + # of meetings	180,000	190,000	210,000	220,000	230,000

5.2.1.2.8	Verify, reconcile, and correct if needed, original applicant information with IMPAC II information	# of applications reconciled	71,000	75,000	80,000	85,000	90,000
5.2.1.2.9	Print IMPAC II reports, retrieve previous summary statements	# of documents	500,000	530,000	560,000	600,000	640,000
5.2.1.2.10	Order or create CDs for review meetings	# of orders	5,200	5,500	5,900	6,300	6,600
5.2.1.3	Meeting Logistics						
5.2.1.3.1	Mail out to participants	# of mail outs	85,000	91,000	96,000	100,000	110,000
5.2.1.3.2	Set up meeting room and assist at meeting	# of meetings set up	4,300	4,600	4,900	5,200	5,500
5.2.1.3.3	Hotel, Conference room, and teleconference arrangements	# of arrangements	7,800	8,300	8,800	9,400	10,000
5.2.1.3.4	Document disposal or disposition	# of documents	1,400,000	1,500,000	1,600,000	1,700,000	1,800,000
5.2.1.4	IC Internal Receipt and Referral						
5.2.1.4.1	Receipt, routing and storage of original applications and duplicates forwarded from CSR or sent directly from applicants	# of applications	90,000	96,000	100,000	110,000	110,000
5.2.1.5	Processing of assigned applications and proposals						
5.2.1.5.1	Administrative review of applications	# of applications	71,000	75,000	80,000	85,000	90,000
5.2.1.5.2	Extraction of information from applications and proposals	# of applications + # of subprojects	100,000	110,000	110,000	120,000	130,000
5.2.1.5.3	Checking quality and quantity of duplicated applications, and arranging for reduplication of applications with errors	# of sets of duplicated applications	71,000	75,000	80,000	85,000	90,000
5.2.1.5.4	Creation and maintenance of meeting and application and proposal files	# of files	75,000	80,000	85,000	90,000	96,000
5.2.1.6	Document Processing and Preparation						
5.2.1.6.1	Creation of formatted and spell checked summary statement drafts containing Description(s) provided by applicant and reviewer critiques and release of final summary statement	# of applications	71,000	75,000	80,000	85,000	90,000
5.2.1.6.2	Other typing, word processing and spreadsheets	# of documents	190,000	200,000	210,000	220,000	240,000

5.3 PROGRAM

The service provider shall provide program technical support services by accomplishing the following activities:

- Administrative support
- Logistical support for conferences and workshops
- IMPAC II and other data management
- Council-related support
- Support for scientific and technical activities

5.3.1 REQUIREMENTS

5.3.1.1 ADMINISTRATIVE SUPPORT The SP shall:

- Perform administrative and technical management of competing applications or proposals, non-competing progress reports, awards, and other program activities
- Create and maintain paper and electronic files for grants, cooperative agreements, R&D contracts, and other program activities
- Create and maintain paper or electronic calendars; create and maintain ListServes, directories of email and mailing addresses; schedule meetings
- Type correspondence, forms, reports, manuscripts, spreadsheets, and scientific initiatives
- Review and distribute incoming mail and faxes; send or deliver outgoing mail and faxes
- Initiate and respond to email queries
- Receive and screen phone calls; route to appropriate IC staff if necessary
- Photocopy, collate, scan documents
- Process requests for supplies, books and equipment; arrange for equipment repairs
- Provide support for staff travel, training, and meeting registration
- Assist with preparation of presentations
- Receive and escort visitors to proper location
- Help prepare and staff information booths at scientific meetings

5.3.1.1.0 CONDITIONS OF PERFORMANCE

Administrative and technical management of competing applications, non-competing progress reports, R&D contract proposals, and awards requires coordination with administrative, review, and grants management staff and must be conducted in accordance with Federal, DHHS, NIH, and IC-specific laws, regulations, policies, and procedures.

For competing applications and R&D contract proposals:

Request for assignment change(s) (901) and ARA forms must be completed as indicated by Program staff, including any necessary IC clearances, and the documents must be sent or delivered to the appropriate NIH office.

Applications, proposals, appendices, and supplemental material must be sorted and distributed to appropriate Program staff.

Materials, schedules and other information must be prepared for Program/Project Officers attending peer review meetings.

Summary statements must be printed and distributed to the correct Program staff.

Summary statements and letters must be sent to investigators; copies of letters must be sent to corresponding institutional officials.

The status of every application or proposal, its summary statement or Technical Evaluation Report/Minutes, special issue flags if any, and Just in Time information (if required) must be tracked through the application process, with follow up to obtain any missing information.

Reports on competing applications must be prepared for pay list discussions.

For non-competing progress reports and supplement requests:

Applications and supplemental requests must be sorted and delivered to correct program staff.

For awards:

Clearances for awards to foreign institutions (1% of awards) and domestic awards with foreign performance sites must be obtained through the Fogarty International Center. Completion of necessary documents must be tracked, with follow up as needed.

Clearances required prior to award of projects including human or animal subjects (73% of awards), including IACUC and IRB approvals, must be obtained and tracked, with follow up as needed.

Throughout the life of projects involving human subjects, especially clinical trials, many additional forms and documents must be requested, obtained and filed, with tracking and follow up if needed. For studies involving human subjects the SP must prepare and distribute to grantees requirements for information on adverse events monitoring, human subjects clearances, and recruitment accrual; track and ensure timely receipt of responses; review responses for completeness; flag inadequate responses and prepare information for review and approval by program staff; contact applicants to obtain missing or unclear information; type and revise OMB clearance requests, FDA correspondence and related regulatory documents.

For contract awards the SP must type, format and revise acquisition plans, requests for contracts, independent government cost estimates, statements of work, technical evaluation criteria, secondary review memoranda, site visit reports, source selection memoranda, debriefings to unsuccessful offerors, and technology transfer agreements for review and revision by program staff.

Grants, cooperative agreements, and R&D contracts established under Interagency Agreements and Memoranda of Understanding require additional communication and sharing of documents.

The confidentiality of personal, non-public, and proprietary information must be maintained. The requirements of the Privacy and Freedom of Information Acts must be understood and implemented. Confidential materials, both paper and electronic, must be disposed of appropriately when no longer needed.

Program files are maintained for grant-related documents, as well as scientific and other program activities, in accordance with Federal records management policy. Periodically, program support staff must retrieve official grant files. For the protection of these Federal documents, ICs have manual or electronic check-in and check-out procedures. Documents removed from official files for duplicating must be replaced promptly and correctly.

Calendar maintenance requires daily updates and resolution of scheduling conflicts. Maintenance of investigator mailing lists may involve spreadsheets, ListServes, or IC-specific email tools.

Scheduling meetings (office, teleconference or videoconference) requires contacting participants and identifying available times, locations and/or equipment, and may include preparation and distribution of agendas and other meeting materials, taking notes during meetings, and preparation and distribution of meeting minutes.

Correspondence, forms, manuscripts, and reports will be edited in Word or Word Perfect following NIH and IC-specific formats, policies, and procedures. Scientific, technical or budgetary information will be prepared as spreadsheets created in Excel or MS Access. Some correspondence and reports (5%), for example those in response to Congressional inquiries, must be prepared immediately.

Mail may arrive by email, fax, NIH internal delivery, USPS (via NIH central mailroom), or by overnight

express mail service or local courier. It may be necessary to identify an appropriate Program/Project Officer or IC staff member recipient using application number or other information, rather than by name, or by considering the content of the mail, using knowledge of program activities and staff responsibilities. Responses to emails requesting information about basic administrative, grant-related, or other non-technical topics may be answered independently, in accordance with IC guidelines.

Outgoing mail will be sent by local courier, overnight express mail service, USPS, internal NIH delivery, or may be hand carried, with special procedures for international destinations.

Time-sensitive mail, email, and faxes (20%) require immediate attention.

Phone calls must be answered in an understandable fashion, even for callers whose command of English may be limited. In accordance with IC guidelines, basic administrative and nonscientific grant-related questions may be answered directly. Other queries should be directed to the appropriate Program/Project Officer or staff member, identified using caller's name, grant number, or the nature of the concern.

Arranging for staff training requires entries in the appropriate NIH database, preparation of all necessary documents, and obtaining necessary approvals.

Arranging travel for Federal staff and for individuals who are not Federal employees requires entering data into the NIH travel database, interacting with the designated NIH travel service provider to secure transportation, arranging lodging, completing any required registration, preparing all necessary documents, obtaining approvals, making revisions and corrections as needed, and processing the reimbursement voucher through appropriate channels and approving officials.

In addition to requirements for domestic travel, foreign travel (15% of trips) requires submitting necessary documents to the Fogarty International Center to obtain country clearances, visas, official government passports, and requesting necessary Department clearances. If travel is paid in part by a non-governmental source, additional clearances must be requested and tracked. These categories of travel require special attention.

Preparation of presentations requires a working knowledge of PowerPoint or similar COTS software.

Visitors to program offices may require assistance in making local travel arrangements or securing audiovisual equipment. Visitors must be handled in a way that protects the confidentiality of NIH documents and data.

Assistance with scientific meetings may occasionally require travel.

5.3.1.2 LOGISTICAL SUPPORT FOR CONFERENCES AND WORKSHOPS The SP shall:

- Prepare requests for professional services contracts and process reimbursement claims
- Arrange for facilities and equipment, including video/teleconferencing
- Provide information to participants concerning meeting arrangements, travel and lodging
- Prepare and distribute meeting materials
- Assist with meeting activities on site
- Assist in preparation and distribution of meeting minutes, reports, and publications

5.3.1.2.0 CONDITIONS OF PERFORMANCE

Conferences, workshops, and similar meetings, including video- and teleconferences, must be arranged in accordance with the provisions of the Federal Advisory Committee Act and the Government in the Sunshine Act.

In addition to conferences and workshops, logistical support is also required for administrative and clinical trials monitoring site visits, data safety monitoring board meetings, and meetings of funded investigators.

Processing of all professional services documents requires protection of highly sensitive personal and

confidential information.

Recipients of professional services contracts frequently require assistance with arrangements for travel, lodging, and filing reimbursement claims.

Information about the availability, cost, and appropriateness of various meeting facilities and sleeping rooms must be prepared for program staff planning a conference or workshop or other meeting.

Use of non-NIH sites for conferences and workshops may require pre-meeting visits to assess adequacy and quality of potential facilities.

5.3.1.3 IMPAC II AND OTHER DATA MANAGEMENT The SP shall:

- Update public and internal websites
- Enter Program Class Codes into IMPAC II via ICO or IC specific software tools
- Track and report on competing applications and non-competing progress reports and awards
- Enter and verify required information on human subjects into IC and IMPAC II Population Tracking databases
- Update local databases and prepare reports

5.3.1.3.0 CONDITIONS OF PERFORMANCE

Web site contributions are generated and posted using COTS software, after securing required approvals.

Program class codes are identified by IC Program staff.

Preparation of reports requires extraction of data from multiple databases using COTS, IMPAC II, or IC-specific data query software tools, as well as proficiency in formatting the output. (TE-6)

Support staff use NIH, IC, and local databases to collect, compile, review, and arrange data to assist in composing recurring and special reports.

Typically, reports are prepared by selecting a group of grants, contracts, applications or proposals using the data entry screen of an IMPAC II or IC-specific data query software tool, then choosing the required report from among pre-existing formats. In some cases it may be necessary to customize a report to meet the requirements of the Program/Project Officer. Grants program assistants should be able to create and format spreadsheets and perform elementary spreadsheet functions.

For grants with protocols involving human subjects, information on race, gender and ethnicity of both targeted and enrolled study participants must be obtained from investigators or other designees, verified, and entered into IC specific databases and, after obtaining necessary approvals, into the Population Tracking module of IMPAC II. Data entry into population tracking data bases requires knowledge of NIH gender and minority inclusion policies and procedures.

ICs and individual program staff use local databases to track scientific initiatives, correspondence, and action items, using COTS or IC-specific software applications.

Some reports, such as those prepared in response to legislative inquiries, must be prepared on short deadlines.

Support staff participate in development of new NIH-wide and IC-specific software applications.

5.3.1.4 COUNCIL ACTIVITIES The SP shall:

- Prepare and transmit Council-related documents and correspondence
- Track Council action items
- Identify applications eligible for Expedited Council Concurrence

5.3.1.4.0 CONDITIONS OF PERFORMANCE

Council-related documents prepared in program include scientific initiatives, responses of NIH staff to appeal letters from PIs, staff recommendations for special actions, MERIT award nominations and extensions, post-Council letters to PIs. Each IC has specific requirements and deadlines for the distribution of Council-related documents. Materials needed by Program staff for each Advisory Council meeting must be identified, collected and bound. Tracking of Council-related documents and actions may use COTS or IC-specific software tools (See TE- 6) and requires follow up to obtain missing documents.

Applications eligible for Expedited Council Concurrence are identified according to IC policy based on funding plans and Council actions.

5.3.1.5 SUPPORT FOR SCIENTIFIC AND TECHNICAL ACTIVITIES The SP shall:

- Search scientific literature databases and prepare reports
- Maintain technical databases

5.3.1.5.0 CONDITIONS OF PERFORMANCE

Lists of publications on specific scientific topics may be created using a variety of publicly available scientific literature search tools.

Copies of publications may be obtained by printing online versions or, if necessary, retrieving copies from the NIH library.

Some ICs maintain technical databases that serve the public.

5.3.2 STANDARDS OF PERFORMANCE**5.3.2.1 QUALITY AND TIMELINESS**

RFP No.	SP Activity	Quality Standard	AQL	Lot	Timeliness Standard	AQL	Max
5.3.1.1	Administrative Support						
5.3.1.1.1	Perform administrative and technical management of competing applications or proposals, non-competing progress reports, awards, and other program activities	Administrative and technical management of competing applications or proposals, non-competing progress reports, and awards is error free	2%	1% of competing applications, proposals, non-competing progress reports, and awards per year	By the schedules set by IC policy for the individual steps	5%	Within 2 WD of the deadline
5.3.1.1.2	Create and maintain paper and electronic files for grants, cooperative agreements, R&D contracts, and other program activities	Paper and E-files are error free	5%	1% of files per year	Within 1 WD of request	5%	Within 3 WD of receipt
5.3.1.1.3	Create and maintain paper or electronic calendars; create and maintain ListSrvs, directories of email and mailing addresses; schedule meetings	Calendar, ListSrvs, directories of email and mailing addresses are accurate, uniquely identified and status is available upon request. Meeting scheduled at earliest time attendees and locations are available	5%	1% of calendars, ListSrvs, directories of email addresses and mailing addresses, and scheduled meeting per year	Within 1 WD of request	5%	Within 3 WD of request
5.3.1.1.4	Type correspondence, forms, reports, manuscripts, spreadsheets, and scientific initiatives	Correspondence, forms, reports, spreadsheets, scientific initiatives are free of error	2%	1% of documents prepared per year	Within 2 WD of receipt for routine correspondence	5%	Within 3 WD
		Urgent correspondence, forms, reports, spreadsheets (5%) are free of error	0.5%	1% of urgent documents prepared per year	Within 3 HR	5%	Within 4 HR

5.3.1.1.5	Review and distribute incoming mail and faxes; send or deliver outgoing mail and faxes	Incoming mail and faxes are distributed accurately	5%	3000 pieces of incoming mail or faxes per year	Within 1 WD of receipt	5%	Within 3 WD
		Outgoing mail and faxes are sent or delivered accurately	0.5%	3000 pieces of outgoing mail or faxes per year	Within 1 WD	5%	Within 3 WD
		Urgent outgoing mail and faxes (20%) are sent or delivered accurately	0.5%	150 pieces of urgent outgoing mail or faxes	Within 3 HR	5%	Within 4 HR
5.3.1.1.6	Initiate and respond to email queries	Emails are accurate and concise	2%	5,000 emails	Within 4 HR	10%	Within 1 WD
5.3.1.1.7	Receive and screen phone calls; route to appropriate IC staff if necessary	Phone calls are answered courteously	0.1%	3,000 phone calls per year	Calls answered on third rings	10%	Within 4 rings
		Correct information is given or call is accurately routed	2%				
5.3.1.1.8	Photocopy, collate, scan documents	Documents are legible and faithfully reproduce the original	2%	# of documents per day	Within 4 HR of request	5%	Within 1 WD
5.3.1.1.9	Process requests for supplies, books and equipment; arrange for equipment repairs	Supplies are available when requested	5%	1% of requests per year	Within 5 WD of request	5%	Within 10 WD of request
		Repairs identified and processed	2%	1% of requests per year	Within 1 WD of request	5%	Within 2 WD of request
5.3.1.1.10	Provide support for staff travel, training, and meeting registration	Arrangements for travel and training are accurate and complete	5%	5% of travel and training actions per month	Processed by all applicable NIH & IC deadlines	5%	Completed 24 HR before onset of travel or training
		Registration is complete and accurate	1%	5% of travel and training registrations per month	Within 2 WD of request	3%	By the announced registration deadline
5.3.1.1.11	Assist with preparation of presentations	Slides are attractive and complete; audiovisual equipment is functional	2%	5% of presentation per year	Within 3 WD of request	5%	Within 5 WD of request
5.3.1.1.12	Receive and escort visitors to proper location	Visitors are greeted courteously and routed to their proper destination	1%	2% of visitors per year	Escort available within 2 minutes of visitor's arrival	2%	Escort available within 5 minutes of individuals arrival

5.3.1.1.13	Help prepare and staff information booths at scientific meetings	Necessary materials are available at the meeting. Responses to queries are courteous and accurate	2%	5% of Information booths staffed per year	Within 0.5 WD of meeting start	2%	Materials available by start of meeting
5.3.1.2	Logistical Support for Conferences and Workshops						
5.3.1.2.1	Prepare requests for professional services contracts and process reimbursement claims	Requests are accurate and complete	2%	3% of documents per year	Within 2 WD of request	5%	Complete no later than 3 WD before service is rendered
5.3.1.2.2	Arrange for facilities and equipment, including video/teleconferencing as needed	Arrangements for facilities and equipment are complete and correct	2%	5% of meetings per year	Within 5 WD of request	5%	Completed by the deadline for the facility to be used
5.3.1.2.3	Provide information to participants concerning meeting arrangements travel, and lodging	Response to request for information is accurate and complete	2%	1% of meeting participants per year	Within 1 WD of request	5%	Within 3 WD of request
5.3.1.2.4	Prepare and distribute meeting materials	Materials are complete and error free; all participants receive required materials	5%	25 meetings per year	Within 1 WD of scheduled distribution	10%	Material distributed at meeting
5.3.1.2.5	Assist with meeting activities on site	Assistance is courteous and problems are resolved	0.1%	25 meeting per year	Immediately upon request	5%	Within 1 HR of request
		Problems are resolved	5%				
5.3.1.2.6	Assist in preparation and distribution of meeting minutes, reports, and publications	Minutes, reports, and publications are complete and error free; all participants receive materials	5%	25 meetings per year	Within 5 WD of scheduled completion	5%	Within 10 WD of scheduled completion
5.3.1.3	IMPAC II and Other Data Management						
5.3.1.3.1	Update public and internal websites	Websites are accurately updated	2%	1% of updates per year	Within 2 WD of change request	5%	Within 5 WD of change
5.3.1.3.2	Enter Program Class Codes into IMPAC II via ICO or IC specific software tools	Codes are accurately entered	5%	1% of entries per year	Within 2 WD of PCC assignment by designated official	5%	Within 5 WD of assignment

5.3.1.3.3	Track and report on competing applications and non-competing progress reports and awards	Competing applications and non-competing progress reports and awards are correctly identified, reported accurately	5%	# of reports per week	Within 2 WD of request	5%	Within 5 WD of request
5.3.1.3.4	Enter and verify required information on human subjects into IC and IMPAC II Population Tracking databases.	Data entered is complete and accurate	2%	# of data entries per week	Data processed within 3 WD of receipt	5%	Within 10 WD of receipt
5.3.1.3.5	Update local databases and prepare reports	Database entries and reports are accurate and complete	5%	1000 data entries per year; 1% of reports per year	Updates entered and reports prepared within 2 WD of request	10%	Within 5 WD
5.3.1.4	Council Activities						
5.3.1.4.1	Prepare and transmit Council-related documents and correspondence	Accurate and complete Council related documents are produced and delivered to appropriate IC staff	3%	5% of documents and correspondence per Council round.	Within 1 WD of scheduled distribution	5%	Prior to Council
5.3.1.4.2	Track Council action items	All Council action items are correctly identified and status is available upon request	2%	5% of Council action items	Within 2 HR of request	5%	Within 1 WD
5.3.1.4.3	Identify applications eligible for Expedited Council Concurrence	Report is complete and accurate	5%	10% of reports per year	Within 2 HR of request	5%	Within 2 WD.
5.3.1.5	Support for Scientific and Technical Activities						
5.3.1.5.1	Search scientific literature databases and prepare reports	Reports are thorough and correct	2%	5% of reports per quarter	Within 5 WD	10%	Within 10 WD
5.3.1.5.2	Maintain technical databases	Databases are accurately maintained	2%	# of data entries per week	Within 5 WD of request	5%	Within 10 WD of request

5.3.2.2 QUANTITY

RFP No.	Requirements/Tasks	Workload Indicator	Base Year	1st Year	2nd Year	3rd Year	4th Year
5.3.1.1	Administrative Support						
5.3.1.1.1	Perform administrative and technical management of competing applications or proposals, non-competing progress reports, and awards	competing applications or proposals	71,000	75,000	80,000	85,000	90,000
		non-competing progress reports	39,000	42,000	45,000	47,000	50,000
		awards	16,000	17,000	18,000	19,000	21,000
5.3.1.1.2	Create and maintain paper and electronic files for grants, cooperative agreement, R&D contracts, and other program activities	files created	122,000	130,000	138,000	147,000	156,000
		files maintained	225,000	239,000	254,000	270,000	290,000
5.3.1.1.3	Create and maintain paper or electronic calendar	calendar entries	1,000,000	1,300,000	1,600,000	1,900,000	1,130,000
	Create and maintain ListServs, directories of email and mailing addresses	directory updates	69,000	71,000	73,000	75,000	78,000
	Schedule meetings	meetings scheduled	69,000	71,000	73,000	75,000	78,000
5.3.1.1.4	Type correspondence, forms, reports, manuscripts, spreadsheets, and scientific initiatives	documents	650,000	670,000	690,000	710,000	730,000
5.3.1.1.5	Review and distribute incoming mail; send or deliver outgoing mail, or faxes	pieces of mail/fax	3,250,000	3,350,000	3,345,000	3,550,000	3,650,000
5.3.1.1.6	Initiate or respond to email queries	emails	6,500,000	6,700,000	6,900,000	7,100,00	7,300,000
5.3.1.1.7	Receive and screen phone calls; route to appropriate IC staff if necessary	calls	2,900,000	3,000,000	3,100,000	3,200,000	3,300,000
5.3.1.1.8	Photocopy, collate, scan documents	documents	16,000,000	16,500,000	17,000,000	17,5000,000	18,000,000
5.3.1.1.9	Process requests for supplies, books and equipment; arrange for equipment repairs	orders	6,900	7,100	7,300	7,600	7,800
		repairs	1,300	1,300	1,400	1,400	1,500

5.3.1.1.10	Provide support for staff travel, training, and meeting registration	travel actions	37,000	38,000	39,000	40,000	42,000
		training actions	1,800	1,900	1,900	2,000	2,000
5.3.1.1.11	Assist with preparation of presentations	presentations	2,000	2,000	2,100	2,200	2,300
5.3.1.1.12	Receive and escort visitors to proper location	visitors	32,000	33,000	34,000	35,000	36,000
5.3.1.1.13	Help prepare and staff information booths at scientific meetings	meetings	100	100	110	110	110
5.3.1.2	Logistical Support for Conferences and Workshops						
5.3.1.2.1	Prepare requests for professional services contracts and process reimbursement claims	requests	11,000	12,000	12,000	13,000	13,000
5.3.1.2.2	Arrange for facilities and equipment, including video/teleconferencing as needed	meetings	990	1,100	1,100	1,100	1,100
5.3.1.2.3	Provide information to participants regarding meeting arrangements, travel, and lodging	requests for information	22,000	23,000	23,000	24,000	25,000
5.3.1.2.4	Prepare and distribute meeting materials	attendees	56,000	58,000	59,000	61,000	63,000
5.3.1.2.5	Assist with meeting activities on site	meeting days	1,900	2,000	2,000	2,100	2,100
5.3.1.2.6	Assist in preparation and distribution of meeting minutes, reports, and publications	documents	990	1,100	1,100	1,100	1,100

5.3.1.3	IMPAC II and Other Data Management						
5.3.1.3.1	Update public and internal websites	updates	11,000	12,000	13,000	14,000	15,000
5.3.1.3.2	Enter Program Class Codes into IMPAC II via ICO or IC specific software tools	PCCs entered	110,000	120,000	120,000	130,000	140,000
5.3.1.3.3	Track and report on competing applications and non-competing progress reports and awards	reports	85,000	88,000	90,000	93,000	96,000
5.3.1.3.4	Enter and verify required information on human subjects into IC and IMPAC II Population Tracking databases	protocols requiring tracking	11,500	12,200	13,000	13,800	14,700
5.3.1.3.5	Update local databases and prepare reports	databases	260	270	280	290	300
		reports	13,500	13,500	13,900	14,800	15,200
5.3.1.4	Council Activities						
5.3.1.4.1	Prepare and transmit Council-related documents and correspondence	documents	2,750	2,800	2,900	3,000	3,100
5.3.1.4.2	Track Council action items	items	16,000	16,000	17,000	17,000	18,000
5.3.1.4.3	Identify applications eligible for Expedited Council Concurrence	reports	400	400	400	400	400
5.3.1.5	Support for Scientific and Technical Activities						
5.3.1.5.1	Search scientific literature databases and prepare reports	reports	6,000	6,200	6,400	6,600	6,800
5.3.1.5.2	Maintain technical databases	databases	50	52	54	56	58